

Model Health Check: Quick Reference Page

Capture the client's objectives and level of Casewise usage

- Client Context
 - Assess the Client's Maturity Level and Skills gaps
 - Assess current use of Casewise products and where any weakness may exist
- Communications Dimension
 - How is the client publishing or communicating the model content?
 - Is the client generally happy with their published output?

Review overall model structure and content

- Scope of the Model
 - Check Diagram Tree to get a sense of the Model's Structure
 - Is the model categorised into clear levels, domains, and views?
 - When published, how easy is it to navigate through the model from a Start diagram?
 - What Diagram Types are being used; do they support the model structure?
 - Which Object Types are being used; which are redundant?
- Diagram Notation & Purpose
 - Do diagrams have a specific purpose and role in the overall model structure?
 - Are diagrams of the same type consistent?
 - Do diagrams follow any specific notation and if so, do they do so correctly?
 - Are there too many Diagram Types (e.g. Duplication and redundancy)
- Diagram Structure & Readability
 - Check and evaluate the Diagram's layout
 - Check Diagram sizing (actual size)
 - Check Diagram use of font and colour
 - Assess use of "chart junk" (are diagrams over-cluttered)?
 - Are there any Diagram "keys" and if so are they set up using separate Help objects?
- Data Quality
 - How many objects do not have a description
 - Does the model contain duplicate "Copy of" Objects?
 - Does the model contain many redundant object instances?
 - Is the formatting for object properties fit-for-purpose?
 - How are multi-line text fields formatted?
 - Are naming conventions meaningful and consistent with best practice?
 - Does use of Associations add value?

Assess the model's design and modeling standards in more detail

- Meta-Model: Initial Assessment
 - Does the underlying meta-model support the model's objectives?
 - Is the meta-model over-complex?

- Could the meta-model benefit from being extended (e.g. new object types so as to bring greater clarity to the model)?
- User-Defined Object, Property, & Association Types
 - Do Object Types have clear Names in both singular and plural form?
 - With associations between the same Object Type, do descriptors have clear direction?
 - Do Association Types have clear Names; can their target and source objects be easily identified?
 - Can use of categories be simplified or modified? Are they being used?
 - Are there many redundant user-defined Association Types?
 - Are there many redundant user-defined Property Types?
- Diagram Templates, Shape Regions, and Styles
 - Is there a separate Template for each category of Diagram?
 - Have all elements that make up a Template been considered?
 - Are there redundant Templates?
 - Are Shape regions adding value - or do they just add clutter?
 - Are there any obvious examples where Shape Regions can be used to add value?
 - Do Styles have clear names and are they being reused?
 - Are there lots of redundant Styles? Be wary of deleting Styles
- Supporting Reference Documentation
 - Have the templates & Modeling Standards been documented?
 - Do modeling standards cover object properties?
 - Has the meta-model been documented?

Review published output and applied use of the model

- Branding & Aesthetics
 - Does the published output have a logo and recognized web design pattern (e.g. inverted L)?
 - Does the published output use stylesheets?
 - Does the published output use Java scripts?
 - Is the overall aesthetics of a professional standard?
 - Is their scope for improvement using CP scripting?
- Accessing the Model
 - Are the navigation links in top and/or left bar useful and do they accord with established design patterns?
 - How are users encouraged to enter the output (e.g. Index pages, Start diagrams)?
 - Are Index Pages useful, and can they be improved?
- Object Pages
 - How are Object Pages laid out - does the chosen style work?

- Can use of associations be improved?
- Page headings (are they meaningful to a user)?
- Are links to external resources set up correctly (avoid use of Browse button)
- Navigation & Orientation within the Model
 - Do Association Types use clear descriptors?
 - Does the use of Shape regions break drill-downs?
 - Do categories support and reinforce the different levels in the model?
 - Do Categories help navigation and orientation in published output?
- Publishing: Sample Check for Common Problems
 - Check incorrect use of Object Links
 - Check incorrect use of the Browse button in URL\Hyperlinks
 - Does the Navigation Shape region work as intended?
 - Check the z-index of Objects (Transparent Styles and Overlaps)
 - Check Diagram sizing (CP setting)
 - Do drill-downs have multiple child diagrams?
- Publishing: Sample Check for Added Useful Features
 - Check for - or suggest - added features (e.g. Feedback)
 - Can the display of the object's or diagram's Category be improved using CP Scripting?
 - Can the link to external documents be improved using CP Scripting?
 - Can the Object page layout be improved (e.g. alternative options or enhanced with CP Scripting)?

Assess the client's use of Model Management

- Model Environment
 - Are the many redundant or old "sandpit" models
 - Establish how many models are being used and how these are being managed and governed?
- Users & Access Rights
 - Have Access Rights and a Power Levels been set up?
 - Have models been left locked?
 - Are Freeze Options being used?
- Model Management
 - Is the meta-model actively managed?
 - What tools or techniques are used to manage the models?
- Model Management in a Multi-Model Environment
 - Is the customer using Auto Modeler to aid their data management?
 - Are object instances duplicated across multiple models?
 - In a multi-model environment, are meta-models aligned?
 - Does the customer fully understand UUIDs and how these work in Import and Export?
- Data Governance
 - Are any properties used to show governance data?

- How are changes managed and recorded?
- Is data actively managed?
- What tools or techniques are used to manage data?
- Is there a Design Authority or other forum for managing the data?

Establish real world context: methods, techniques, and business relevance

- Business Process Management \ Process Maturity
 - Is there a commitment to Process Management over silo-based Management?
 - Are there designated Process Owners; if so, what do they do?
 - Is there a commitment to developing Process Maturity and are current Processes scored?
 - Is there any sense of active Stakeholder Management
- Methodologies and Best Practice
 - What Methods \ Methodologies are being used?
 - Are they working with As Is and To Be states?
- Services to the Business
 - Do the Team offer Internal Consulting Services?
 - What, if any, practical real-world uses of the model are there?

Explore wider possibilities and other tools

- Interactivity, Integration, and Automation
 - Interactive Governance
 - Workflow and automation
 - Third-party Integration
- Advanced analysis options
 - Simulation
 - CMI
- Non-technical Consulting
 - N/A